

UNIVERSITY PAYROLL GIFT REPORTING INSTRUCTIONS

Gifts received by faculty/staff are taxable and must be reported in income if their value exceeds the following dollar thresholds:

- Gift certificates/cards of any amount.
- Gifts of tangible personal property greater than or equal to \$75.
- Gifts of tangible personal property greater than \$400 to a long-service or retired employee.

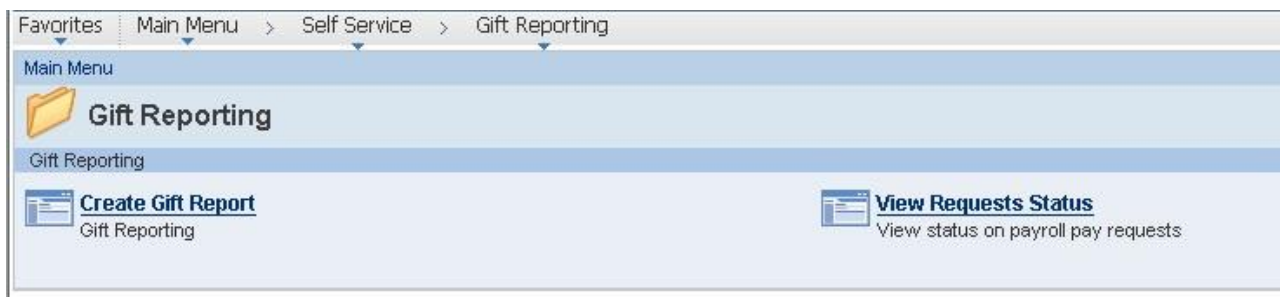
Note: If you enter an invalid record #, you will have to delete the row and reenter the correct record #.

Gift reporting by University employees is now reported online via PeopleSoft Employee Self Service rather than the gift reporting form previously used to manually key gift amounts during payroll processing. The old gift reporting forms will no longer be accepted. A University employee can report gift amounts for a Healthcare employee but a Healthcare employee cannot report a gift for a University employee via Gift Reporting in Self Service. They must seek a University employee to report the gift amounts for them.

A report will automatically be generated each night notifying Payment Services of all entries for that day which will include the purchaser's empl ID and name for each gift reported. Please note that reporting gift amounts does **not** give the employee additional monies via the paycheck. The process only adds the gift amount to the system for tax purposes.

Accessing the System

1. Access the Pay Request system by logging on to the following address: <https://psofthr.cc.emory.edu> and use your network ID and password to access the system.
2. Click the following links to access Gift Reporting>Self Service > Gift Reporting > Create Gift Report



To Enter a Gift Report Amount

1. Select Create Gift Report option from the menu. You will be directed to a data entry screen to enter all employees with gift amounts.
2. Enter the empl ID in the first field. If necessary, click on the magnifying glass icon on the right side of the empl ID's field box to initiate a search record for the right employee.

Favorites Main Menu > Self Service > Gift Reporting > Create Gift Report

Gift Reporting

Please enter emplid, empl_rcd and gift amount.

Gift Recipients								
	Empl ID	Recipient's Name	Empl Record	Company	Pay Group	Value of Gift	Purchaser	Purchaser's Name
1			0			0.000		

Look Up Empl ID

Empl ID: begins with

Empl Record: =

Name: begins with

First Name: begins with

Last Name: begins with

Payroll Status: =

Company: begins with

Pay Group: begins with

Department: begins with

Department: begins with

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed.

[View 100](#) First 1-30

Empl ID	Empl Record	Name	First Name	Last Name	Payroll Status	Company	Pay Group	Department	Department
0000034	0	Stuart, Carlos A	Carlos A	Stuart	Leave W/PY	EUV	EUM	733055	SOM, Medicine, Pr
0000034	1	Stuart, Carlos A	Carlos A	Stuart	Leave W/PY	EUV	TCM	511000	TEC OIM - Balanc
00004949	0	DONOTUSEEisenstein, Rina	Rina	DONOTUSEEisenstein	Terminated	EUV	EUM	U463000	SOM, OME, Grad M
0000112	2	Hughes, James M	James M	Hughes	Active	EUV	EUM	733025	SOM, Medicine, In
0000112	4	Hughes, James M	James M	Hughes	Terminated	EUV	TCM	UIMINMOT	Internal Med Infect
0000124	0	Johnston-Miller, Mary Margaret	Mary Margaret	Johnston-Miller	Terminated	EUV	EUB	U267000	Grad Sch, Journals
0000136	0	Rafferty, Cristina S	Cristina S	Rafferty	Terminated	EUV	EUM	U219000	EC, Biology
0000140	0	Jurkovic, Claudine	Claudine	Jurkovic	Terminated	EUV	EUM	U463000	SOM, MED, Medicir
0000140	1	Jurkovic, Claudine	Claudine	Jurkovic	Terminated	EUV	EUM	U463001	SOM, MED, Cardiol
0000146	0	Niu Limin	Limin	Niu	Terminated	EUV	EUM	U477000	Winship, Cancer Ir
0000149	0	Voronkov, Michael V	Michael V	Voronkov	Terminated	EUV	EUM	U221000	EC, Chemistry
0000152	0	Yiu Yimin	Yimin	Yiu	Terminated	PLIV	EUM	U483000	SOM Pathology

- Enter known attributes of the individual you are looking for such as the last name, first name, department #, etc.
- Click on the Look Up button to initiate search. If the employee has more than one record, a list will be provided of all records associated with that employee. The search list will include Empl ID, Record #, Name, Payroll Status, Department, Company, and Pay Group for easier identification of the correct employee.
- No nonemployees will be allowed to be entered including those paid under company NIH or those with person-of-interest employee records.
- Job records with WOC, NOC, or VAM paygroups will not be available for selection either.

Look Up Empl ID

Empl ID: begins with

Empl Record: =

Name: begins with

First Name: begins with

Last Name: begins with

Payroll Status: =

Company: begins with

Pay Group: begins with

Department: begins with

Department: begins with

Basic Lookup

Search Results

View 100 First Last

Empl ID	Empl Record	Name	First Name	Last Name	Payroll Status	Company	Pay Group	Department	Department
0035311	0	Waller,Edmund K.	Edmund	Waller	Active	EUV	EUM	732520	SOM: HMO: BMT
0035311	2	Waller,Edmund K.	Edmund	Waller	Active	EUV	TCM	519500	TEC Hem Onc Balance Sheet
0364385	0	Waller,Eric Martin	Eric	Waller	Terminated	EHC	CLB	470550	Arrhythmia Center

- Click on the Empl ID of the employee you are reporting gifts for, preferably an active record if available. Please note that if you select an employee with a record number other than zero you will have to type in the record number in the corresponding field.

Favorites | Main Menu > Self Service > Gift Reporting > Create Gift Report New Window Personaliz

Gift Reporting

Please enter emplid, empl_rcd and gift amount.

Gift Recipients								
	Empl ID	Recipient's Name	Empl Record	Company	Pay Group	Value of Gift	Purchaser	Purchaser's Name
1	0035311	Edmund Waller	<input type="text" value="0"/>			0.000	<input type="text"/>	

- Enter all pertinent information in each applicable field such as the employee record #, value of gift and purchaser's empl ID. Utilize the magnifying glass icon towards the right side of the Purchaser's field box to initiate a search record for the purchaser's empl ID if necessary. The recipient's name, company, pay group, purchaser's name will automatically populate based on the entries made in corresponding fields after hitting the enter button or by clicking on the sign located at the right side of the row which inserts a new row.

Favorites | Main Menu > Self Service > Gift Reporting > Create Gift Report

New Window Personalize P

Gift Reporting

Gift Reporting

Please enter emplid, empl_rcd and gift amount.

Gift Recipients									
	Empl ID	Recipient's Name	Empl Record	Company	Pay Group	Value of Gift	Purchaser	Purchaser's Name	
1	0035311	Edmund Waller	2	EUV	TCM	50.000	0375464	Laura Cox	+ -
2			0			0.000			+ -

Submit Clear

- Click on the plus sign icon to insert a new row.
- Repeat the steps above until all employee's gift amounts have been entered. If you make a mistake and need to delete a row of information, click on the negative sign on the other side of the plus sign icon.
- Upon completion of all information, click on the Submit button to submit entries into the payroll system. If there is an invalid record #, the system will give you an error message. You will have to delete the row and reenter the correct information.

Favorites | Main Menu > Self Service > Gift Reporting > Create Gift Report

Submit Confirmation

The Submit was successful.

OK

- Click the OK button.

View Request Status

- Submitters will be able to view their submitted gift reporting. Click the following links to access Gift Reporting: **Self Service > Gift Reporting > View Request Status**
- Payment Statuses

- Not Submitted, Rejected – gift amount was submitted but rejected by Payroll
- Waiting Approval – gift amount was submitted and is waiting on approval by Payroll to pull into payroll process
- Closed – gift amount submitted, approved, and pulled into payroll process during corresponding pay cycle

[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Gift Reporting](#) > [View Requests Status](#)

[New Window](#) | [Personalize Page](#)

[Submit Request](#) | [Not Submitted, Rejected](#) | [Waiting Approval](#) | [Closed](#)

SOM Approver Name	SOM Signoff Date	Department Approver Name	Dent Signoff Date	HR Approver Name	HR Signoff Date	Payroll Approver Name	PR Signoff Date	Final Approver Name	Final Signoff Date	Payrun Type	Pay Group	Status	Class	Empl ID	Empl Record	Name	Details	Em Cd	Hours	Pay Rate	Gross Pay	Comment	Deptid	ID Num
1						Cox, Laura B.				NxtOnCycle	UM8	Active	9 PDF Ndgrr	0391199	0	Dawa, Tashi	Details	PZ8		25.00	Gift Reporting	736526	123802	
2						Cox, Laura B.				NxtOnCycle	EUM	Active	1 FcftyAbv	0066410	0	Kramer, Michael Root	Details	PRZ		50.00	Gift Reporting	814000	123404	
3						Cox, Laura B.				NxtOnCycle	EUM	Active	5 Exec, BA	0322471	0	Fox, John T.	Details	PRZ		1.00	Gift Reporting	701000	123396	
4						Cox, Laura B.				NxtOnCycle	EUR	Active	B MedHouse	0391567	0	Carthan, Kristal Alexis	Details	PRZ		25.00	Gift Reporting	720615	123556	
5						Cox, Laura B.				NxtOnCycle	TCM	Active	Member (CI)	0035311	2	Waller, Edmund K.	Details	PRZ		50.00	Gift Reporting	519500	123801	

3. Click on the tabs at the top to select the status that you would like to view. You can click on any of the field headings to have the view resorted by that field.
4. If you have any questions regarding the payment request system, please contact the Payroll Department at 404-727-6100.